

## Client Tax Questionnaire 2023

Taxpayer Information		Spouse Inform	<u>nation</u>	
First Name		First Name		
MIddle Name		MIddle Name		
Last Name		Last Name		
SSN		SSN		
Occupation		Occupation		
Date of Birth		Date of Birth		
Mobile #		Mobile #		
Email Address		Email Address	;	
Address				
Street				
City	S	State	Zip	
Resident of Texas as of 12/31?				
<u>Dependents</u> First Name	Last Name	SSN	Date of Birth	Relationship

## **Banking Information**

Name of Institution

Bank Account #

Routing #

Type of Account